

CLAIMS

What is claimed is:

- 15 sub 1. A method for exchanging information over a communications network, the
 2 B1 method comprising:
 3 connecting at least two clients to a proxy over the communications network;
 4 activating a shared session between the at least two clients; and
 5 enabling co-navigation of at least one web document with dynamic content by
 6 the at least two clients during the shared session.

- 1 2. The method of claim 1 wherein the at least two clients include at least one
 2 customer and at least one company representative.

- 1 B1 3. The method of claim 1 wherein connecting the at least two clients to the proxy
 2 includes receiving a message from any of the at least two clients, the message
 3 indicating a willingness to begin the shared session.

- 1 4. The method of claim 1 wherein activating the shared session between the at
 2 least two clients further includes:
 3 collecting client state information; and
 4 synchronizing browsers of the at least two clients using the client state
 5 information.

1 5. The method of claim 4 wherein the client state information includes a client
2 cookie, an Internet address of a current web document displayed to a client, and
3 relevant information from the current web document.

1 6. The method of claim 1 wherein any of the at least two clients is behind a
2 firewall.

1 7. The method of claim 1 wherein enabling the at least two clients to co-navigate
2 includes:
3 presenting a web document retrieved from a web site to the at least two
4 clients; and
5 submitting responses received from any of the at least two clients to the web
6 site.

1 8. The method of claim 7 wherein presenting the web document further
2 includes:
3 retrieving the web document from the web site;
4 modifying the web document; and
5 delivering the modified web document to the at least two clients.

1 9. The method of claim 8 wherein modifying the requested web document
2 includes:

- 3 identifying a dynamic event in the web document; and
4 replacing a link directing the dynamic event to the web site with a link or code
5 directing the dynamic event to the proxy.

- 1 10. The method of claim 8 wherein modifying the requested web document
2 includes incorporating at least one business rule into the web document when the at
3 least one business rule applies to the web document.

- 1 11. The method of claim 8 wherein modifying the requested web document
2 includes replaces all references to a top frame in the web document with a code
3 referencing a frame which would be the top window had the web document not been
4 loaded in a co-navigation session.

- 1 12. The method of claim 9 wherein submitting responses further includes:
2 receiving a web response from any of the at least two clients;
3 converting the web response to a web request; and
4 transferring the web request to the web site.

- 1 13. The method of claim 1 wherein co-navigating includes jointly completing a
2 web form by the at least two clients.

- 1 14. The method of claim 1 further comprising:

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2 a first client specifying an object on a web document displayed to the first
3 client during the shared session; and
4 displaying the object on a web document displayed to a second client.

1 15. The method of claim 14 further comprising scrolling the web document
2 displayed to the second client to a portion of the web document that includes the
3 object.

1 16. The method of claim 1 further comprising selectively restricting web features
2 from any of the at least two clients during the shared session.

1 17. The method of claim 1 further comprising selectively enabling web features
2 from any of the at least two clients during the shared session.

1 18. The method of claim 1 further comprising selectively blocking personal
2 information of a first client from a second client during the shared session.

1 19. The method of claim 1 wherein co-navigation is performed in a secure
2 manner.

1 20. The method of claim 1 further comprising providing going back and forward
2 functionality during the shared session.

3 at least one application server to maintain a plurality of shared sessions; and
4 a database server to authenticate participants of the plurality of shared
5 sessions and store information related to each of the plurality of shared sessions.

1 28. The system of claim 27 wherein each application server includes:
2 communication drivers to maintain connection between the application server
3 and each of a plurality of client devices during a corresponding shared session;
4 a session manager to establish and coordinate the plurality of shared sessions;
5 a web server to transfer requests from the co-navigation service to
6 corresponding client devices;
7 a co-navigation engine to provide co-navigation functionality during the
8 shared session; and
9 at least one server integration application programming interface (API) to
10 provide an interface between the co-navigation service and at least one third party
11 system.

1 29. The system of claim 28 wherein the co-navigation engine further includes:
2 a parsing and lexing engine to retrieve web documents from a web site, to
3 prepare the web documents for display to corresponding participants of the shared
4 session, and to submit responses received from any of the participants to a web site;

5 a business rule engine to maintain a plurality of predefined business rules
6 pertaining to co-navigation, the plurality of predefined business rules being used in
7 preparing the web documents for display during the shared session;

8 a shared state manager to maintain state information during the shared
9 session; and

10 a pseudo client to retrieve web documents from web sites and to send requests
11 to the web sites.

1 30. The system of claim 29 wherein the parsing and lexing engine is capable of
2 identifying every dynamic event in the web document, replacing links directing
3 dynamic events to the web site with links directing the dynamic events to the proxy,
4 and modifying the web document according to predefined business rules.

1 31. The system of claim 29 wherein the co-navigation engine is configured to
2 provide joint completion of a web form by participants of the shared session.

1 32. The system of claim 24 wherein co-navigation is performed in a secure
2 manner.

1 33. The system of claim 24 wherein any of the client devices are connected to the
2 co-navigation service via a wireless carrier.

34. A computer readable medium comprising instructions, which when executed on a processor, perform a method for exchanging information over a communications network, the method comprising:

- connecting at least two clients to a proxy over the communications network;
- activating a shared session between the at least two clients; and
- enabling co-navigation of at least one web document with dynamic content by the at least two clients during the shared session.